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Model Performance Standards for Superfund Project Officers, Deputy Project Officers, and Work Assignment Managers/Delivery Order Officers

(U.S.) Environmental Protection Agency, Washington, DC

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SEPT 26, 1988

OSWER DIRECTIVE 9242.5-02
OFFICE OF
SOLID WASTE AND EMERGENCY RESPONSE

MEMORANDUM:

SUBJECT: Model Performance Standards for Superfund Project Officers, Deputy Project Officers, and Work Assignment Managers/Delivery Order Officers

FROM: Henry L. Longest II, Director
Office of Emergency and Remedial Response

TO: Addressees

Purpose

The purpose of this memorandum is to provide you with some background concerning a recently completed contractor study, and to transmit the attached model performance standards and suggested weightings to assist you in developing individual standards for personnel serving in the above Superfund contract management positions.

Background

In implementing the Superfund program, we must ensure that response actions are technologically and fiscally sound. Contract management oversight is an integral tool for accomplishing this purpose. As Superfund's reliance on contractor support has continued to increase, it is essential that performance standards accurately reflect the major fiscal and management responsibilities of those involved in contract management activities, as well as the relative importance of those activities.

In the fall of 1987, the firm of Booz Allen & Hamilton was tasked to undertake a study of performance standards as well as overall technical contract management roles, responsibilities, and resource requirements. The study was based on extensive interviews conducted with personnel in Headquarters and four EPA regions, and included a detailed review of over 40 major guidance documents.

A principal finding of the study, which was completed in late March, was that effective management of large and complex Superfund contracts requires an integrated team approach to management. The "Technical Contract Management Team" must include the Project Officer, Deputy Project Officers, and Work Assignment Managers/Delivery Order Officers. The study primarily dealt with the roles and responsibilities of these individuals and found that there was a general lack of focus on the differing responsibilities within these three levels, which was reflected in the existing performance standards. Therefore, the attached model performance standards recognizing these roles and responsibilities, in relation to other professional duties, were developed to measure performance more accurately.

Recent reviews of Regional contract operations suggested a wide variation in the percentage of time actually devoted by Deputy Project Officers to carrying out their duties. Thus, in addition to the attached model performance standards, we are attempting to offer some guidance to the weighting that should be given to this group of standards.

Implementation

The model performance standards provide generic criteria for determining performance of the above personnel in their roles as managers of Superfund technical contracts. These specific standards are not mandatory, nor are they by any means all-inclusive. Should you decide to incorporate them into your performance appraisal process, you should adapt them to your own programmatic needs. However, please remember that all staff with contract responsibilities are required to have performance standards to reflect those responsibilities.

The level of effort required to perform the role of Project Officer (PO) or Deputy Project Officer (DPO) will vary from Region to Region, depending on support to the DPO for administrative functions, and the size and scope of the contract work. In general, we believe that the standards for a PO or DPO should reflect a weight of 50% to 75% of the total performance standards in smaller Regions (with smaller contract efforts) and 75% to 100% in larger Regions. In the larger Regions, where the PO's tasks are weighted more heavily, you may wish to expand on the number of individual objectives.

We believe that the standards for Work Assignment Manager/Delivery Order Officer should be weighted at 25% to 40% of their total performance requirement. This recognizes that a major part of the work of an RPM or OSC is done through contractors, and that they should be rated, in part, on their successful management of those contractors.

Questions or comments regarding the model performance standards should be directed to John Comstock at FTS 475-9349.

Attachments

Addressees:

Director, WMD - Regions I, IV, V, VII, VIII
Director, ERRD - Region II
Director, HWMD - Region III, VI
Director, TWMD - Region IX
Director, HWD - Region X
Director, ESD - Regions I - X

MODEL PROJECT OFFICER
PERFORMANCE STANDARD

CRITICAL JOB ELEMENT:

Provides oversight of Superfund technical contracts from procurement through completion.

OBJECTIVE #1:

To prepare all technical planning documents and budget information for the initial procurement process.

Outstanding

The employee initiates precise procurement requests; prepares or reviews precise Statements of Work and detailed contract budget estimates; develops precise technical evaluation criteria and performs accurate, fair, and comprehensive technical evaluations of proposals in accordance with the Agency's source evaluation and selection procedures, often exceeding necessary procurement lead times. Consistently anticipates need for procurements well in advance and ensures that all paperwork is submitted well in advance of need. Consistently anticipates project problems or requirements and accommodates them in the planning process. Activities are performed prior to established deadlines with little need for revision, and work products are well organized and well written.

Fully Successful

With some direction, produces required procurement requests; prepares or reviews Statements of Work and contract budget estimates; develops technical evaluation criteria and performs comprehensive technical evaluations of proposals in accordance with Agency source evaluation and selection procedures, within necessary procurement lead times. Provides creative solutions to project problems or requirements as they arise. Activities are completed within established deadlines, and work products are organized and written so that they only occasionally need minor revisions.

Unsatisfactory

Even with some direction, the employee produces procurement requests, Statements of Work, or budget estimates that are late, poorly planned, or disorganized. Technical evaluation criteria may be incomplete, poorly written, or inappropriate to the tasks; technical evaluations of proposals may disregard elements of

Agency source evaluation and selection procedures, often with insufficient lead time to accommodate established procurement milestones. Project problems are solved slowly, passed to other staff for solution, or not resolved. Activities often are completed after established deadlines, and work products require major revisions.

OBJECTIVE #2:

To provide overall technical and fiscal oversight, planning, and prioritization for contracted projects, including technical and fiscal direction, coordination, and evaluation.

Outstanding

The employee provides appropriate planning for budget and schedule deadlines and consistently ensures that the labor mix meets the knowledge, skills, and abilities required for the project; that all planned tasks are within the scope of the contract; and that provisions of the conflict of interest and key personnel clauses are enforced. Consistently reviews and evaluates contractor financial reports, including monthly invoices, contractor status reports, and other supporting documentation, to identify discrepancies. Carefully reviews reasonableness of vouchers and establishes procedures to ensure that DPOs or WAMs/DOOs closest to the work review vouchers in a timely manner. Voucher review procedures are timely and consistent with the Prompt Payment Act. Coordinates with Contracting Officer (CO) to resolve fiscal problems as soon as they are identified. Establishes and reliably maintains precise, timely, and appropriate project management records that document contractor performance, and promptly provides information to the CO as needed to assist in award fee processing, appeal actions, protests, default actions, or contract closeouts prior to established schedules. Sets priorities for work assignments, tasks, and resources to achieve the optimal effectiveness of Regional staff and fiscal resources, often in advance of appropriate deadlines.

Fully Successful

With some direction, the employee plans budget and schedule deadlines and ensures that labor mix meets the knowledge, skills, and abilities required for the project; that planned tasks are within the scope of the contract; and that provisions of the conflict of interest and key personnel clauses are enforced. With some assistance, reviews and evaluates contractor financial reports, including monthly invoices, status reports, and other

supporting documentation, to identify major discrepancies. Coordinates with the CO to resolve fiscal problems with minimal delay. Maintains, with minor revisions, project management records that document contractor performance, and provides information to the CO as needed to assist in award fee processing, appeal actions, protests, default actions, or contract closeouts within established schedules. With some guidance, sets priorities for work assignments, tasks, and resources to achieve an appropriate level of effectiveness of Regional staff and fiscal resources, within appropriate deadlines.

Unsatisfactory

Even with some direction, the employee periodically fails to adequately plan budget and schedule deadlines and to ensure that the labor mix meets the knowledge, skills, and abilities required for the project; that planned tasks are within the scope of the contract; and that the provisions of the conflict of interest and key personnel clauses are enforced. Often fails to review and evaluate contractor financial reports, and does not coordinate with the CO to resolve fiscal problems when they are identified. Maintains unreliable or inaccessible project management records that document contractor performance, and often does not provide information to the CO as needed to assist in award fee processing, appeal actions, protests, default actions, or contract closeouts within established schedules. Often fails to set adequate priorities for work assignments, tasks, and resources, resulting in an inadequate level of effectiveness of Regional staff and fiscal resources, and beyond appropriate deadlines.

OBJECTIVE #3:

To provide functional oversight of Deputy Project Officers (DPOs) and Work Assignment Managers/Delivery Order Officers (WAMs/DOOs).

Outstanding

The employee consistently and effectively monitors work of DPOs or WAMs/DOOs, including contractor evaluation, through regularly scheduled meetings and telephone contacts. Assists DPOs and WAMs/DOOs with planning or problemsolving to achieve optimal project performance. Consistently reviews and evaluates contractor deliverables and monthly contractor progress reports, providing clear, direct comments. Consistently ensures that DPOs and WAMs/DOOs monitor contractor performance against work plan budgets and schedules. Necessary corrective action is taken promptly. Performance is characterized by anticipation of management problems and DPO and WAM/DOO needs; allows DPO or WAMs/DOOs

to anticipate and solve problems creatively, yet is prepared to provide guidance promptly if the need arises.

Fully Successful

With some direction, the employee monitors work of DPOs or WAMs/DOOs through periodic meetings and telephone contacts. On request, assists DPOs and WAMs/DOOs with planning or problem-solving to maintain project performance. Regularly reviews and evaluates contractor monthly progress reports and deliverables, providing comments that require little revision. Ensures that DPOs and WAMs/DOOs monitor contractor performance against work plan budgets and schedules. Performance is characterized by prompt response to management problems and a willingness and ability to provide guidance or information on request; allows DPOs or WAMs/DOOs to solve problems and, as necessary or on request, provides guidance with minimal delay.

Unsatisfactory

Even with some direction, the employee meets infrequently with DPOs or WAMs/DOOs and often fails to monitor their activities and needs. Provides late and vague comments on contractor monthly progress reports and deliverables. Fails to ensure that DPOs and WAMs/DOOs monitor contractor performance against work plan budgets and schedules. Performance is characterized by delayed response to management problems, lack of or delayed problem-solving assistance to DPOs and WAMs/DOOs when it is needed, and inattention to detail.

MODEL DEPUTY PROJECT OFFICER
PERFORMANCE STANDARD

CRITICAL JOB ELEMENT:

Provides Regional or contract area oversight of Superfund technical contracts.

OBJECTIVE #1:

To prepare all technical planning documents and budget information at the Regional or contract area level for the initial procurement process.

Outstanding

The employee is proactive in providing guidance to Work Assignment Managers/Delivery Order Officers on how to rewrite an acceptable work assignment. Ensures that Statements of Work and work assignments are precise and within the scope of the contract. Consistently reviews budget estimates and confirms budgetary allotment for them; performs accurate, fair, and comprehensive technical evaluations of proposals in accordance with the Agency's source evaluation and selection procedures, often exceeding necessary procurement lead times. Consistently anticipates project problems or requirements and accommodates them in the Regional or contract area planning process. Activities are performed prior to established deadlines with little need for revision, and work products are well organized and well written.

Fully Successful

With some direction, reviews required procurement requests; ensures that Statements of Work, work assignments, and budget estimates are within the scope of the contract and budget; and performs comprehensive technical evaluations of proposals in accordance with Agency source evaluation and selection procedures as requested. Provides creative solutions to project problems or requirements as they arise in the Regional or contract area planning process. Activities are completed within established deadlines, and work products are organized and written so that they only occasionally need minor revisions.

Unsatisfactory

Even with some direction, the employee produces procurement requests, Statements of Work, work assignments, and budget estimates that are late, poorly planned, or disorganized. Often

fails to establish budgetary allotment for project. Requested technical evaluations of proposals may disregard elements of Agency source evaluation and selection procedures, often with insufficient lead time to accommodate established procurement milestones. Project problems are solved slowly, passed on to the Project Officer (PO) for solution, or not resolved. Activities often are completed after established deadlines, and work products require major revisions.

OBJECTIVE #2:

To provide overall Regional or contract area oversight, planning, and prioritization for contracted projects, including technical and fiscal direction, coordination, and evaluation.

Outstanding

The employee proactively establishes procedures and initiates appropriate plans at the Regional or contract area level to meet budget and schedule deadlines and consistently ensures that the labor mix meets the knowledge, skills, and abilities required for the project; that all planned tasks are within the scope of the contract; and that provisions of the key personnel and conflict of interest clauses are enforced. Establishes and implements timely procedures to evaluate contractor financial reports, including monthly invoices, status reports, and other supporting documentation, to identify discrepancies. Voucher review procedures are thorough, timely, and consistent with the Prompt Payment Act. Promptly notifies PO of any financial problems and works closely to resolve them as soon as they are identified. Establishes and reliably maintains precise, timely, and appropriate project management records that document contractor performance, and promptly provides information to the PO as needed to assist in appeal actions, protests, default actions, or contract closeouts. Sets priorities for tasks and resources to achieve the optimal effectiveness of Regional staff and fiscal resources, often in advance of appropriate deadlines.

Fully Successful

With some direction, the employee plans at the Regional or contract area level to meet budget and schedule deadlines and ensures that the labor mix meets the knowledge, skills, and abilities required for the project; that planned tasks are within the scope of the contract; and that provisions of the conflict of interest and key personnel clauses are enforced. When requested by the PO, reviews and evaluates contractor financial reports,

including monthly invoices, status reports, and other supporting documentation, to identify major discrepancies. Notifies PO of any financial problems and, when requested, works closely to resolve them with minimal delay. Maintains, with minor revisions, project management records that document contractor performance, and provides information to PO on request to assist in appeal actions, protests, default actions, or contract closeouts. With some guidance, sets priorities for tasks and resources to achieve an appropriate level of effectiveness of Regional staff and fiscal resources, within appropriate deadlines.

Unsatisfactory

Even with some direction, the employee periodically fails at the Regional or contract area level to adequately plan for budget and schedule deadlines and to ensure that the labor mix meets the knowledge, skills, and abilities required for the project; that planned tasks are within the scope of the contract; and that the provisions of the conflict of interest and key personnel clauses are enforced. Often fails to review and evaluate contractor financial reports to identify major discrepancies as requested by PO, and does not coordinate with the PO to resolve fiscal problems when they are identified. Maintains unreliable or inaccessible project management records that document contractor performance, and often does not provide information to the PO as needed to assist in appeal actions, protests, default actions, or contract closeouts within established schedules. Often fails to set adequate priorities for tasks and resources, resulting in an inadequate level of effectiveness of Regional staff and fiscal resources, and beyond appropriate deadlines.

OBJECTIVE #3:

To provide functional oversight of Work Assignment Managers/Delivery Order Officers (WAMs/DOOs).

Outstanding

The employee consistently and effectively monitors and reviews work of WAMs/DOOs through regularly scheduled meetings and telephone contacts. Assists WAMs/DOOs with planning or problem-solving to achieve optimal performance. Proactively identifies training needs and ensures that WAMs/DOOs have the tools and information necessary to manage their contractors. Consistently reviews and evaluates work assignments/delivery orders, Statements of Work, and work assignment amendments prepared by WAMs/DOOs; contractor deliverables; and monthly contractor progress reports, providing clear, direct comments.

Consistently ensures that WAMs/DOOs monitor contractor performance against work plan budgets and schedules. Performance is characterized by anticipation of management problems and WAM/DOO needs; allows WAMs/DOOs to anticipate and solve problems creatively, yet is prepared to promptly provide guidance if the need arises.

Fully Successful

With some direction, the employee monitors work of WAMs/DOOs through periodic meetings and telephone contacts. On request, assists WAMs/DOOs with planning or problem-solving to maintain project performance. Regularly reviews and evaluates work assignments/delivery orders, Statements of Work, and work assignment amendments prepared by WAMs/DOOs; contractor deliverables; and monthly contractor progress reports, providing comments that require little revision. Ensures that WAMs/DOOs monitor contractor performance against work plan budgets and schedules. Performance is characterized by a willingness and ability to provide guidance or information on request; allows WAMs/DOOs to solve problems and, as necessary or on request, provides guidance with minimal delay.

Unsatisfactory

Even with some direction, the employee meets infrequently with WAMs/DOOs and often fails to monitor their activities and needs. Provides late and vague comments on work assignments/delivery orders, Statements of Work, and work assignment amendments prepared by WAMs/DOOs; contractor deliverables; and monthly contractor progress reports. Fails to ensure that WAMs/DOOs monitor contractor performance against work plan budgets and schedules. Performance is characterized by delayed response to management problems, lack of or delayed problem-solving assistance to WAMs/DOOs when it is needed, and inattention to detail.

MODEL WORK ASSIGNMENT MANAGER/DELIVERY ORDER OFFICER
PERFORMANCE STANDARD

CRITICAL JOB ELEMENT:

Develops and manages work assignments/delivery orders to ensure effective compliance with the overall contract and completion of the contracted activities or tasks effectively, in a timely manner, and at the most cost-effective price.

OBJECTIVE #1:

To initiate work assignments/delivery orders by preparing a Statement of Work and, if necessary, work assignment amendments that clearly define essential task components and deliverables and are within the scope of the overall contract Statement of Work.

Outstanding

The employee consistently prepares Statements of Work and work assignment amendments that are carefully planned and clearly define the project's objectives, task schedules, milestones to be met for each task, the deliverables to be produced, and the date of delivery. Statements of Work reflect the scope of the contract and rarely need revision. Furthermore, each Statement of Work contains site-specific requirements and guidance on the scope of the work with sufficient technical information to allow the contractor to respond with a cost-effective work plan. Work indicates excellent attention to detail and creative problem-solving. Actively and consistently processes work assignment documents in a timely way so that project activities proceed smoothly.

Fully Successful

With some direction, the employee prepares Statements of Work and work assignment amendments that demonstrate efficient planning and are well-defined in terms of the project's objectives, task schedules, milestones to be met for each task, the deliverables to be produced, and the date of delivery. Generally provides work assignment documents so that project activities can proceed within a reasonable schedule.

Unsatisfactory

Even with some direction, the employee prepares Statements of Work and work assignment amendments that are inefficiently planned and poorly defined in that they may not include major tasks and milestones, the period of performance or deliverables. Shows little initiative to ensure that project activities proceed smoothly; DPO or PO must request necessary work assignment documents.

OBJECTIVE #2:

To manage and monitor technical performance of assigned work assignments/delivery orders.

Outstanding

The employee consistently manages work assignments efficiently with few adjustments in methodology or tasks. Actively examines contractor-submitted work plan to ensure that it reflects technical scope, schedule, and budget estimates. Meets regularly with PO, DPO, and contractors to discuss work assignment/delivery order progress and provides creative and useful solutions to problems. Consistently reviews incurred costs of assigned tasks for reasonableness and provides routine feedback to PO or DPO concerning problems identified. Establishes routine procedures to ensure that informal agreements with contractors are well-documented and that contractor work rarely proceeds under a misunderstanding following a meeting. Reliably maintains precise management records to assess information on the work status of a work assignment/delivery order; reviews and evaluates contractor deliverables, and accepts or rejects them promptly with well-documented, action-oriented comments; and submits a final report to the PO or DPO promptly at project completion that includes a summary of tasks completed and ensures the timely processing of all documentation necessary for contractor performance evaluation award fee processing and work assignment/delivery order closeout.

Fully Successful

With some direction, the employee manages work assignments with few adjustments in methodology or tasks. Meets periodically with PO, DPO, and contractors to discuss work assignment/delivery order progress, and solves problems with some assistance from the PO and DPO. Maintains, with minor revisions, management records to assess information on the work status of a work assignment/delivery order; reviews and evaluates contractor deliverables, and accepts or rejects them with documented

comments; and submits a final report to the PO or DPO within a reasonable time following project completion that includes a summary of tasks completed and ensures the timely processing of all documentation necessary for contractor performance evaluation award fee processing and work assignment/delivery order closeout.

Unsatisfactory

Even with some direction, the employee manages work assignments with frequent adjustments in methodology or tasks, and relies on PO or DPO to solve problems. Meets infrequently with PO, DPO, and contractors and discusses, but often does not solve, problems. Maintains unreliable or inaccessible management records to assess information on the work status of a work assignment/delivery order; inadequately reviews and evaluates contractor deliverables, and accepts or rejects them with vague and poorly documented comments; and submits final report to the DO or DPO after substantial delay following project completion that may not include an accurate summary of project tasks, thus delaying contractor performance evaluation award fee processing and work assignment/delivery order closeout.

OBJECTIVE #3:

To manage and monitor budget and schedule performance on assigned work assignments.

Outstanding

The employee consistently manages work assignments/delivery orders efficiently and within budgetary and time constraints. Establishes and maintains precise, timely, and appropriate project management records that document contractor budget and schedule status of a work assignment/delivery order. When requested by the PO or DPO, consistently analyzes financial reports and anticipates problems that may affect schedules or deliverables; initiates proper actions to control budgets and meet changing project conditions; and obtains timely clearance for subcontractors and consultants. Regularly communicates with contractors to ensure that budgets and schedules are being met. Consistently and promptly reviews and evaluates contractor deliverables, and accepts or rejects them promptly with well-documented, action-oriented comments. Submits final report, including a budget summary, to PO or DPO promptly at project completion.

Fully Successful

With some direction, the employee manages work assignments/delivery orders within budgetary and time constraints.

Maintains, with minor revisions, project management records that document contractor budget and schedule status of a work assignment/delivery order. When requested by the PO or DPO, may identify financial and other problems that may affect schedules or deliverables; with some assistance, takes proper action to control budgets and meet changing project conditions. Obtains clearance for subcontractors and consultants. Periodically communicates with contractors to ensure that budgets and schedules are being met. Reviews and evaluates contractor deliverables, and accepts or rejects them with documented comments. Submits final report, including a budget summary, to PO or DPO at project completion.

Unsatisfactory

Even with some direction, the employee manages work assignments/delivery orders with frequent adjustments to budget and schedule. Maintains unreliable or inaccessible project management records that document contractor budget and schedule status of a work assignment/delivery order. When requested by the PO or DPO, often fails to identify financial and other problems that may affect schedules or deliverables. Often takes inadequate action to control budgets and meet changing project conditions. Often fails to obtain clearance for subcontractors and consultants. Meets infrequently with contractors, making it difficult to ensure that budgets and schedules are being met. Provides late and vague comments on contractor deliverables. Submits final report to PO or DPO, after substantial delay, following project completion; it often does not include accurate budget summaries.

OBJECTIVE #4:

To ensure the integration of contractor efforts to achieve program goals for contract projects.

Outstanding

The employee consistently manages work assignments/delivery orders with a recognition of other contractor efforts in the program, ensuring that tasks are well-coordinated to provide optimal efficiencies. Promotes and enthusiastically supports coordination among projects.

Fully Successful

With some direction, the employee manages work assignments/delivery orders so that they do not inhibit progress of

other contractor efforts in the program, seeking to coordinate tasks when possible. Supports coordination among projects.

Unsatisfactory

Even with some direction, the employee manages work assignments/delivery orders without regard for progress or activities of other contractor efforts in the program. Does not attempt or discourages coordination among projects.